

## **FINANCIAL ANALYST**

### **NATURE OF WORK**

Serves the public with responsible administrative, purchasing administration and fiscal analysis work.

### **DISTINGUISHING FEATURES**

Work involves analyzing departmental budget requests and formulating requests into the City's annual budget; writing bid specifications and requests for proposals for goods and services to be purchased by operating departments; and conducting management and financial analyses and related analytical assignments. Work also involves receiving and processing property and casualty claims submitted by persons under the City's self-insured program. Work is performed with considerable independence according to established state laws and the City's ordinances, rules and regulations.

### **ESSENTIAL FUNCTIONS** *(These essential duties are only illustrative.)*

Reviews departmental budget requests for appropriateness and availability of revenue; conducts special analyses of budget proposals and recommends appropriate action; monitors budget amendments and provides analytical assistance to departments and the Finance Director. Monitors execution of approved budgets for assigned departments. Reviews and approves purchase requests to ensure conformance with approved budget limitations.

Prepares text, charts, and graphs, using computerized software to integrate departmental budget requests into annual budget document.

Assists the Central Services Manager and other officials in conducting management and operational analyses to improve the effectiveness and efficiency of departmental and city operations.

Reviews and approves purchase requisitions and purchase card activities of departments; prepares requests for proposals and bid specifications for various projects, equipment and capital items purchased by departments.

Uses software to develop and update databases for monitoring purchase orders and purchase card activities.

Interviews persons to obtain information and pertinent facts concerning claims, potential claims and reported occurrences, including documents and statements from concerned parties; investigates claims to assess potential liability and recommends negotiation, settlement or denial of claim.

Maintains reasonable and predictable attendance.

## **SUPERVISION RECEIVED**

Works under the general supervision of the Central Services Manager or other administrative superior. Work is reviewed by observation and annually for accuracy, completeness, timeliness and adherence to guidelines and requirements and overall results achieved.

## **SUPERVISION EXERCISED**

Supervision is not a responsibility, but employees in this class may provide guidance or assistance to less experienced employees.

## **WORKING CONDITIONS & PHYSICAL DEMANDS**

Work is performed primarily in an office setting and is essentially sedentary with occasional walking, standing, bending, and carrying items under 25 pounds such as papers and files. Work may require periods of extended computer use and performing tasks with set timelines.

## **SUCCESS FACTORS (KSAs)**

Knowledge of municipal administration and management principles and practices.

Knowledge of operations, functions, policies, and procedures of departmental budgetary assignments.

Knowledge of state and municipal purchasing laws, regulations and procedures.

Knowledge of the basic principles and practices of risk management and self-insured liability claims administration.

Knowledge of MS Office Suite or other word processing, spreadsheet and data base software standard that may be adopted by City departments.

Ability to compile, analyze, and evaluate data.

Ability to prepare and present concise reports.

Ability to establish and maintain effective working relationships with multiple departments and staff at multiple levels as required by the work of the position.

Ability to manage multiple assignments efficiently under pressure while meeting firm deadlines.

Skill in the operation of a personal computer.

Skill in communicating effectively, both verbally and in writing.

## **EDUCATION, TRAINING & EXPERIENCE**

Graduation from an accredited college or university with a Master's degree in Business or Public Administration or a related field and 2 years of administrative experience in a governmental agency. Any satisfactory equivalent combination of experience and training which ensures the ability to perform the work may be substituted for the required experience.

### **NECESSARY SPECIAL REQUIREMENTS**

Residency requirement: Classified employees hired after January 1, 1984 may live anywhere in Winnebago County or anywhere within an area fifteen (15) miles from the Public Safety Building within six (6) months of their date of completion of probation. Employees hired prior to January 1, 1984 shall be subject to their conditions of employment in effect at that time.